



## ***Council Retention Workshop***

**Purpose:** To present and discuss ideas for improving council membership retention through the development of a comprehensive retention plan.

**Learning Objectives:**

1. To understand the importance of retaining existing members of your council.
2. To identify the reasons people join and leave the Navy League.
3. To develop a list of council activities that will improve council retention.
4. To develop an action plan for completing a Council Retention Plan.

**Agenda:**

1. Discuss the statement "A good membership recruiting program starts with retention".
2. Discuss the benefits to the council of keeping your existing members.
3. Complete an assessment exercise to identify areas for improvement in your council retention plan.
4. Finalize action plans.
5. Establish retention goals, measurement and follow-up.

**Limit:** 2 Hours

**Retention - An Overview**

The Navy League of the United States cannot grow significantly without also having excellent retention of existing members.

**Why?**

**Two new members must be recruited to replace one lost member!**

The Navy League Council Guide for Retention has a thorough presentation of the elements of a comprehensive council retention plan. The Council Guide for Welcoming New Members complements the basic guide. Together, these guides provide the foundation for this workshop. Throughout our discussion we will also review the "best practices" of successful councils and will share ideas presented by participants from their councils. This workshop will start with a review key of elements from the council guides, then provide exercises to allow participants to collect ideas for improving their council's retention plan (or developing one, as the case may be). Finally, good ideas without action to bring them to fruition will not result in any improvement, so the last element of this workshop is to develop an action plan to bring participant's ideas into operation.

Let's start with your ideas. **First**, what are some reasons why councils retain members? List them below as "Effective" and rank them. **Next**, think of practices in councils that discourage retention. List them below as "Ineffective" and rank them. Complete the list working by yourself, then we will share our results with each other. You should retain this list for later use in your retention planning.

<u>Effective</u>	<u>Ranking</u>	<u>Ineffective</u>	<u>Ranking</u>

## ***Retention Basics***

The Vice President for Membership in one of our most successful councils summarizes retention in three words:

### ***Recruit - Involve - Retain***

**Recruit.** Recruiting is everyone's job. Many councils ask each member to bring a guest at least once a year and try to recruit them into the Navy League. The concept is "If every member recruits one member a year, we will double in size!" *What's wrong with this statement?* First, not everyone is active in council activities, so inactive members probably won't recruit a new member. Second, a new recruit must become involved in council activities before they will consider renewing their membership. Third, the best councils don't put all their effort into a single recruiting strategy. Every council should recruit Community Affiliate members because they bring younger members with good ideas from the business world, as well as provide revenue to support your programs. Every council should recruit the parents of the young people in the youth programs supported by your council. Parents are also younger and will help your council plan activities that are more attractive to council members and prospects with families. Other sources of new members include:

- spouses of active duty personnel;
- parents of new recruits;
- alumni organizations (including parents of alumni) for military academies and maritime academies;
- reserve organizations;
- local civic organizations (Kiwanis, Rotary, Lions, Optimists, Sertoma, etc), many of which support youth groups;
- separating personnel (active duty personnel enrolled in a Transition Assistance Program - TAP, can join the Navy League while still on active duty); and
- members of veteran service organizations (e.g. VFW, American Legion, TROA).

Some or all of these sources are targeted for recruitment by councils seeking to grow membership. However, here is a **caveat**: to recruit large numbers of new members your council needs diverse activities so that every member will find an activity and/or program that appeal to them and will encourage them to get involved.

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**Involve.** As already noted, active councils with diverse activities will attract new members. *Perhaps more important, they will retain their members!* When anyone joins an organization, they have expectations for their future experience. All new members want to be valued as individuals and many want to contribute. If we know our member's expectations, we can strive to meet them. Although most people are not inclined to immediately volunteer, they will consider getting involved if it is evident that everyone is expected to get involved and that there are meaningful activities sponsored by the council. **To get involvement you have to ask!**

The Council Retention Guide encourages the use of a New Member Survey (page 11) that should be sent with the Welcome Letter (page 10). The survey can be mailed back or collected at the first meeting attended by the new member. New members expressing an interest in any activity should immediately be placed in contact with the council member in charge of that activity so they can be assigned a meaningful task. **Failure to follow-up on the New Member Survey makes this process useless!** The guide also suggests the following practices will encourage involvement:

- assigning a sponsor or host/hostess to every new member and every member who transfers into your council;
- a personal invitation to attend the next scheduled meeting from the sponsor/host;
- sponsor/host escorts the new member at the first meeting attended and introduces the new member formally to the council during the business meeting;
- identifying new members (and guests) with a color-coded badge at their first meeting;
- presenting a Membership certificate and NLUS pin at a business meeting;
- conducting a Navy League orientation session (page 13) for all new members that includes information on the Navy League and your council; and
- periodic contact from a retention committee member (3 months, 6-8 months) to assess satisfaction with membership.

These practices are part of a New Member Welcoming Program and are *proactive* - they should make the new member feel welcome and valued, and thus more likely to get involved!

**Retain.** When someone is warmly welcomed, volunteers to help, contributes and feels valued, they will feel committed to the organization. Meaningful work with proper recognition is a sure-fire method to keep your members. However, some members

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will slip away unless we focus on their retention as they approach renewal. A program to identify members approaching renewal, contact them, and assess their reasons for not renewing is the responsibility of the Retention Committee in your council. The guide recommends the following activities:

- Establish a **retention goal** for the council and ask everyone to help retain their friends, family and colleagues. Publish your retention number and track progress monthly. "What you measure is what you expect!"
- Use a **Member Interest Survey** (example on page 17) to validate that your council is meeting member expectations. The survey should be administered periodically (annually or biannually recommended). As with the New Member Survey, follow-up on the results of the survey by changing council practices. Also, the results of the survey should be tabulated and communicated widely in the council newsletter and web site. *Members expect feedback if they take the time to respond to your survey!*
- Provide recognition for both effort and results in your retention program. Celebrate the attainment of your retention goal (e.g. a pizza party for the Retention Committee).
- Using the Navy League Online Community Reports function, identify those members who are within 90 days of renewal (pending renewal), suspended (next month after renewal month) and former (30 days past renewal month).
- Establish a monthly calling program for each group, with a call priority of suspended, then pending, then former. A telephone script is recommended so that the calls send a consistent message. A suggested script for former members is on page 14 of the guide.
- Periodically hold a phone-a-thon to call all former members and ask them to rejoin.
- Provide additional recognition for long-term members - 5, 10, 15 and Life.

These are the ideas recommended by the Council Retention Guide. Let's collect some of your ideas for improving retention.

**Exercise**

**Purpose:** To prepare a list of responses to statements by former members telling us why they didn't renew their Navy League membership.

- Action:**
1. Review the list on page 9 of the guide "Why do Navy League Members Drop Out".
  2. Discuss responses to each stated "reason". How would you overcome the statement if you were calling a former member who said "this is the reason I did not renew"? Does the council need to change a program or practice? Evaluate your responses for feasibility (can you do it) and effectiveness, then keep the responses you'll implement. Consider the list on page 8 "Why do Navy League Members Join" in your responses.
  3. Prepare a summary table of objections and responses below.
  4. **Future:** Schedule a one-hour practice session with your Retention Committee members to review this list before your start a phone-a-thon and/or monthly calls. Practice responding to the stated reason, then **capture the best responses in a script**.
  5. Keep your list of "reasons" current by incorporating responses from phone surveys conducted by Retention Committee members.

**Limit:** This exercise should take 30 minutes.  
The practice session takes another hour.

**Responses to "Why Navy Leaguers drop out"**

<b>Stated reason</b>	<b>Responses</b>
Not part of the group	1. 2. 3.
Nothing worthwhile to do	1. 2. 3.

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<b><i>Stated reason</i></b>	<b><i>Response</i></b>
<i>No contact with active duty Navy, Marine Corps, or Coast Guard</i>	1. 2. 3.
<i>Council doesn't sponsor anything</i>	1. 2. 3.
<i>Navy League was not what I expected</i>	1. 2. 3.
<i>We can't play golf on the base anymore</i>	1. 2. 3.
<i>Other</i>	1. 2. 3.

### ***Review of Council Programs***

The Navy League Operations Manual describes many programs that can be sponsored by a council. Large councils often sponsor many of these programs, while small councils often limit their programs to the number of volunteers willing to support the activity. The limited approach tends to self-perpetuate the council's size, since many potential members don't find activities or programs that would inspire them to join. To become larger, a council must have purpose and the programs to support that purpose. The Navy League Mission and Goals state the National purpose. Meeting the National goals requires a diversity of activities, each lead by a committed volunteer and supported by "many hands". Providing activities for members of

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all ages is important if your council wants to attract younger members. In addition, there needs to be opportunity for leadership by younger members, often requiring the "old timers" to step aside and become mentors to the new leadership. When a council creates the energy and commitment to the Navy League's Mission and Goals, growth will follow. So, how do we get started?

The biggest mistake a council can make is to announce a large number of new programs and ask council members for support. A gradual approach is preferred, wherein programs are added *based upon member interest* so the support for them develops. In general, a council should not attempt to promote more than a few new programs in a single year. Once a new program is running smoothly and is successful, additional programs can be added based again on member interest.

Where do we start? Surveys are recommended, including a New Member Survey, Terminated Member Survey and a Member Interest Survey. However, we must recognize that getting responses is not easy. Conducting the survey by telephone is one way to improve response rates. However, if your council does not currently perform surveys, the list below provides a starting point for assessing your council programs and determining if your council has the necessary diversity attract new members and to retain most of your members.

**Patriotism:** Although the events of September 11<sup>th</sup> are not as fresh in our minds today as they were in 2001, there is still a lingering question in the minds and hearts of many Americans: "What can we do to support the War on Terrorism?" Supporting the young men and women in uniform who are fighting this war can become a major purpose of your council. Operation Interdependence was developed from this question.

**Networking:** Many business people are very interested in expanding their network of contacts, including military, community and other business leaders. Community Affiliate members want the opportunity to network and seek new business. Independent professionals (e.g. real estate agents, insurance salesmen, financial planners) depend on networking for survival. If you use this approach you must commit to provide the events. If you have military facilities in your

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community, your business members would like the opportunity to meet military leaders in a social setting.

**Visibility:** Closely related to networking is visibility in the community. Some individuals seek opportunities for leadership in their volunteer activities - they want the spotlight! A business can increase community visibility through Community Affiliate membership. Community Affiliate members can be featured in your council's newsletter, website, and other promotional material (event flyers, newspaper articles, etc.). Programs with visibility include a Speakers Bureau and sponsorship opportunities (adopted ships, units or youth groups). Some councils, in cooperation with a Fleet Family Service Center, host sea service family appreciation events, providing visibility through sponsorship for their business members.

**Youth Groups:** Many citizens want to support youth groups in their community, and the Navy League can help! Your council may support the Navy Sea Cadet Corps (NSCC), the Navy League Cadet Corps (NLCC), the Naval Junior Reserve Officer Training Corp (NJROTC), the Marine Corps Junior Reserve Officer Training Corps (MCJROTC), Young Marines, and the Naval Reserve Officer Training Corps (NROTC). The young people supported by Navy League councils are the future leaders of our country; businesses and service organizations are proud to support them.

**Ship Visits:** If your council is located near a body of water, ship visits may be possible. Navy, Coast Guard and Military Sealift Command ships can be toured, as well as any military base, station or facility. Reserve Centers are located across the United States and are the only military presence in some communities. If there is a port near your council, ask the sponsoring service to schedule a ship for a visit, then provide a warm welcome.

**Adoption:** Many councils adopt ships, stations and units of

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the sea services. Adoption can be mutually beneficial as your council develops a relation with the ships crew and each visits the other. Your council can provide monetary or in-kind rewards to crew members selected for recognition. Financial contributions to the Morale, Welfare and Recreation Fund is also recommended. Community Affiliate members may welcome the opportunity to participate in the adoption of military units.

### **Social:**

Many councils have found that an active social calendar attracts members. However, activities should be diversified based upon the ages of your members. Younger members want family friendly events, older members often want luncheon meetings (don't want to drive after dark), while many members want dinner meetings with a speaker. Many members appreciate the opportunity to just socialize with Navy Leaguers.

These are some of the activities reported by councils that help recruit and retain both individual and business/Community Affiliate members. The next exercise will give you an opportunity to review your current activities, assess the need for expanded activities, and prepare for new programs by identifying "next steps".

### **Exercise**

**Purpose:** *To prepare a list of action items to improve your Council's retention.*

**Action:**

- 1. Prepare a list of current activities and programs supported by your council. Identify those activities that support a Navy League goal and indicate the age group attracted to this program - Younger (Y), Working - no kids (WNK), Active Retired (AR), and Inactive Retired (IR).*
- 2. Review the list of effective practices (from our first exercise) and the list of council programs above, plus any council survey data available. List possible new programs that could fill the "gaps" in your current program and activity list - gaps in both goal coverage and age appeal. Select a few new programs (no more than 5) that your council should be able to support. List them in the matrix below.*

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<b><i>Navy League Goal</i></b>	<b><i>Current Programs</i></b>	<b><i>Age GP</i></b>	<b><i>New Programs</i></b>
<i>Educate national and local leaders and the nation</i>	1. _____ 2. _____ 3.	_____ _____ _____	
<i>Support the men and women of the sea services</i>	1. _____ 2. _____ 3.	_____ _____ _____	
<i>Provide assistance to sea service families</i>	1. _____ 2. _____ 3.	_____ _____ _____	
<i>Support youth programs</i>	1. _____ 2. _____ 3.	_____ _____ _____	

2. Determine what action, if any, is necessary to start the new programs selected for your members.
3. Prepare an action plan to gain approval for the benefit and start planning for initiation.

<b><i>What action is needed?</i></b>	<b><i>Who will complete this action?</i></b>	<b><i>Is Board approval required?</i></b>	<b><i>When will action be completed?</i></b>	<b><i>Remarks</i></b>

4. *Schedule a follow-up meeting to review progress and complete the final list.*

**Limit:** *This exercise should take 30 minutes.*

### ***Develop A Retention Plan***

The Council Retention Guide provides a sample Retention Committee Plan on page 10. Development of a Retention Plan starts with the appointment of a Retention Committee Chair, who can gather interested members to form the committee. The committee members then complete the plan based upon what activities the council can support. We recommend the Board of Directors approve the plan so that the committee gets Board support when needed. The committee can follow the format in the guide or develop their own format, but we recommend the following issues be resolved and addressed in the plan:

**Welcoming Committee.** Will a separate committee be used, or will the retention committee assume this function. In either case, welcoming new members is a critical success factor for high retention. Which of the recommended practices will be used?

- Assignment of sponsor/host to all new & transferred members
- New member Welcome Letter with recent newsletter
- New Member Survey
- Invitation to attend first meeting - by letter, email or telephone call
- First meeting escort and introduction by sponsor/host
- Special badge at first meeting
- Membership certificate and NLUS pin presented at business meeting
- Orientation Session for all new members
- Follow-up contact at 3 months and 6-8 months

**Retention Committee.** The exercises completed earlier identify new programs and initiatives to attract a wider membership (in age and interests). *These new programs are not the responsibility of the retention committee!* Using the Retention Committee Plan and the discussion on pages 5-6, decide which of the recommended practices will be used (exclusive of the practices already discussed for the welcoming committee).

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- Establishing a retention goal and tracking/reporting results monthly to the Board of Directors
- Establishing a separate Community Affiliate retention committee for retaining business members
- Conducting a Member Interest Survey (don't forget to include any new programs) and making recommendations for assignment of new members to activities, as well as recommendations to the Board of Directors for program changes (based upon survey results)
- Recognition for retention committee members who give effort and get results
- Recognizing members who renew (thank you note, newsletter note or website note)
- Calling pending members to remind them to renew and respond to concern they raise
- Calling suspended members to ask them to renew
- Calling former members to administer the Former Member Survey and ask them again to renew their membership
- Hold former member phone-a-thons
- Provide additional recognition for long term members

Remember, you will not retain your new members unless they are involved in a meaningful way in the Navy League. The secret to retention is **"Recruit - Involve - Retain"**!

***The End!***